HOW TO HIRE A TECHNOLOGY CONSULTANT FOR YOUR LAW PRACTICE

By Judd Kessler

A good consultant once told me, "The more I charge, the more likely it is that the client will implement my recommendations. It's simple human psychology: the more it costs, the better it is, the more likely you'll trust it."

A consultant is someone who tells you the obvious and charges you for it. A good consultant will not only tell you what to do next, he'll also tell you how to do it. If your practice has hit a plateau, or you haven't yet implemented the technology that you know you need, or if you just want to earn more and work less—then the right consultant can work wonders.

Before hiring a consultant, wouldn't you like to know about the consultant's biases, style, point of view, range of knowledge and problem-solving track record? You'll want to find out if you're hiring a "consultant" who gets a commission for selling you a product. If that's the case then you have every right to know. The interview questions below will help you learn what you need to know. But first, study these descriptions of three types of consultants. Consultants fall into three groups: Father Knows Best (FKB), Wing and a Prayer (W&P), Diamond Cutters (DC).

Type 1: Father Knows Best (FKB)

This type of consultant can be young or old, female or male, and they have one attribute in common—they're arrogant. They don't listen, and treat all of their clients the same way—as children. Don't be fooled! True, you're paying for expertise, but don't forget that, when it comes to your law practice, you're the final expert. In the end, no matter how thoroughly you explain your unique situation and needs, you get what they say you get. Period.

How to spot 'em: Broach your problem by asking, "What do you recommend for..." and listen carefully for telltale phrases such as, "I always

tell my clients..." or "The best thing for you is..." If you get that impatient feeling in your gut, or frustration tightening into a tension headache these are sure signs that you're heading for consulting hell. How much time is the prospective consultant willing to invest to learn about your unique law practice? This type of consultant spends less time than any other type analyzing what's best for you. Why? Because they already know what's best!

KEY TIP: Words that never pass the FKB's lips: "Please tell me more about you."

Type 2: Wing and a Prayer (W&P)

This type of consultant is a situational consultant. If your situation matches their know-how, you're in luck. If not, may the gods help you. The W&P consultant means well, and tries to help every client in every situation. They learn as they go, so future clients benefit from the job they botched for you. They often don't realize the limits of their expertise. Worse yet, they may help you today and hurt you tomorrow when the situation requires different expertise.

How to spot 'em: Listen for limited problem-solving capabilities. The W&P has a few fall-back positions, and trots them out to answer every situation. Pay attention to spin, and be alert for embellishment. If you start to feel like you're interviewing a college kid, when the resume says CEO, you may be in for a roller-coaster consulting ride. Get in-depth in your conversation, and bring up all the "fine points" that you can think of. You're probing for depth of knowledge, and creative problem solving.

KEY TIP: A Wing and a Prayer consultant's favorite line is, "This worked for my last client."

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Type 3: Diamond-Cutter (DC)

This type of consultant can help you shape and polish your practice. Experienced, they first listen, then assess, then apply their know-how for a custom solution to your situation. You may have to interview quite a number of consultants before you meet the master who recognizes your practice as a diamond in the rough.

How to spot 'em: It's not unusual for a DC to guide you through the interview. The feeling you're looking for: Relief! Finally, someone who understands what your practice is all about.

KEY TIP: Be patient! A good DC will appreciate that you take the assessment process seriously.

Questions to ask a consultant before hiring:

Have you worked with a firm of our size, and at a similar point in practice growth?

The size of your firm is only one factor. It affects the type of network you choose, the number of user licenses needed, and the range of job descriptions, which has bearing on the type of training provided. A long standing firm will have different needs than a start-up practice. You want your consultant to tailor an approach based on both your size today and where you'll be tomorrow.

What practice management software do you usually recommend?

This is a bit of a trick question. You want a consultant who knows several different types of software, but the perfect answer goes something like, "I'll show you A and B, and then we'll decide together which one feels better and meets your unique practice needs and goals."

What hardware do you recommend?

Most consultants don't make money on hardware, but that shouldn't stop a good consultant from advising you on the hardware infrastructure you'll need to manage your workflow and grow effectively. Everyone has favorites, but decisions should flow from goals. Goals, software, hardware. In that order. So the answer is, you want the hardware necessary to support the software you choose. And you want the software necessary to achieve your goals. (On a nuts-and-bolts level, you want a stable system that offers the best data protection. State-of-the-art is client-server technology, where the database is buffered against corruption, and filters take place at the server, not the client workstation, which eases strain on your network wire. Now go and find the diamond cutter who can explain that to you.)

Have you done a professional goals assessment for a law practice?

Don't trust someone with your technology if they don't understand that technology serves practice goals. Your consultant should understand why you're asking this question. It's up to you to set your goals and a practice coach is a better bet than a technology consultant if you really need help. The key here is that technology is designed to serve goals. Essentially, know what you want to achieve, choose a system to help you get there, and support your system with a rock-solid infrastructure.

Are there any questions you'd like to ask us?

Get a feel for the consultant's thinking. They should begin with an assessment of how your practice is currently structured, and what are your stated goals.

What discrepancies do you see between what we say we want, and what you think we need?

There are always discrepancies. Aside from technical know-how, this is the single most important thing that you are paying for: a discrepancy analysis. Good consultants see you on two levels: what you say, and what really is. They should strive to bring these things into one harmonious whole.

How much time will it take?

The good consultant will break this down into two steps: assessment and implementation, and give you a timeline for each.

Are you the right consultant for us?

An honest consultant will give you a fair assessment of his or her own limitations.

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QUESTIONS: HOW TO HIRE A TECHNOLOGY CONSULTANT

1. A FKB consultant comes ready with all the answers.
        True   False

2. A W&P consultant may be helpful depending upon your situation.
        True   False

3. A DC consultant helps you assess your practice goals and needs.
        True   False

4. A consultant is someone you pay to tell you the obvious.
        True   False

5. One of the most important things you pay a consultant for is a discrepancy analysis between what you think you need and what you really need.
        True   False

6. Some consultants get paid to recommend certain products.
        True   False

7. A W&P type consultant might say, "Let's assess your goals before we discuss which technology might be best for you."
        True   False

8. A likely statement coming from a FKB type consultant is, "I've never run into this before."
        True   False

9. A DC type of consultant is the easiest to find.
        True   False

10. Every law firm needs a client/server network.
        True   False

11. The consulting priorities should be Hardware, Software, Training.
        True   False

12. You should hire a technology consultant when you need help setting goals.
        True   False

13. There's no need for a consultant to spend time understanding your current practice as it's going to change with technology anyway.
        True   False

14. A good technology consultant needs technical knowledge, not problem solving skills.
        True   False

15. All consultants use basically the same approach and style.
        True   False

16. The more you pay a consultant, the more likely her recommendations will be implemented.
        True   False

17. Most consultants make money on hardware recommendations.
        True   False

18. Software dictates what hardware you need.
        True   False

19. Your goals determine what software you'll need.
        True   False

20. A good consultant will begin with your goals, then assess how you practice is currently structured, then recommend technology to get from where you are to where you want to go.
        True   False

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